

Lodge History Committee

A paper on suggested responsibilities and duties of a Lodge History Committee

Bro. William Boyd, PM, Valley-Hi Lodge #1407

February 1, 2020

The most efficient way to organize and preserve a lodge history and remain in accordance with Grand Lodge of Texas Law is through the designation of a Lodge History Committee. One might initially consider the appointment of a Lodge Historian but Article 264 (Officers Listed) of the Law Book of the Grand Lodge of Texas does not currently permit such an appointment in the subordinate lodge. Given the limitation of Grand Lodge law, the Worshipful Master still has great latitude in setting up committees therefore the most expedient course would be the creation and appointment of a history committee.

Why a Lodge History Committee: Anyone who even dabbles in masonic reading soon realizes that much of what we know about our fraternal history has been handed down through the ages by way of lodge histories captured in both their minutes, and in published Lodge Histories. Much of what we know about some of our famous predecessors begins with their lodge historical documents. George Washington left a trail of masonic historical gems in his personal correspondence as our First President with the many masonic lodges with whom he communicated during his presidency; correspondence captured by the office of The President and captured in the records of many of those lodges. Every subordinate lodge is a piece of the larger, fraternal masonic story and the more information that is captured, recorded, and documented, the more complete our fraternal biography for future researchers. Consider the possibility that some young new Entered Apprentice who joins one of our lodges today at 20 years of age goes on to be inaugurated as President of the United States 35 years later; that lodge where the this new President was raised has now become a visible part of the history of the country and of the larger masonic fraternal story.

History Committee Designation: Because there is no current provision for the election or appointment of a Lodge Historian, it would become the prerogative of a lodge Worshipful Master to create the History Committee and might request the lodge codify the committee as a standing committee in the Lodge Rules & Regulations.

Committee Chairman Qualifications: The History Committee Chairman should be a Past Master, but must be at least a Master Mason. It should be a brother with time to perform some of the necessary duties of archiving records and writing documentation for lodge events and milestones. It should be someone that would be available to serve in the capacity for several years to manage (and perform) the initial duties of capturing previously un-archived, un-organized lodge documents.

The Chairman of the History Committee should:

- Be familiar with lodge administrative documentation (Annual Returns, Audit Form 71, Requests for Dispensation, Service Awards, etc)
- Be at least somewhat familiar with the general history of the lodge (when it was chartered, significant members, significant events, etc)
- Be available to attend and document lodge events (installations, social events, service awards, community events, etc)
- Be comfortable on computers, creating and manipulating files, and scanning and filing documents into electronic files
- Be able to dedicate time to electronically archiving documents, and then organizing them into a logical file system
- Have a pre-disposition to organizing and a methodical approach to problem solving

The Chairman or other History Committee member might:

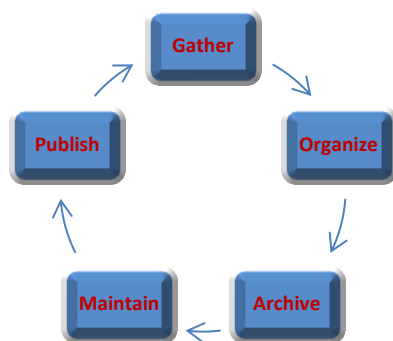
- Be a photographer, or possess camera and recording equipment
- Be a talented (experienced) writer, be an editor, or both

History Committee Member Qualifications: A committee formed to support the History Committee Chairman might be composed of two to three master masons willing to assist the chairman in the duties specified in the following paragraphs. If the lodge is creating this committee to do the initial capture and organization of lodge documentation, it might be wise to designate this committee to last two or more years to protect the integrity of the development process. If a lodge has never organized their documents and published a lodge history, a three-year term for the Lodge History Committee might be reasonable.

Duties of a Lodge History Chairman and Committee: A Lodge History Chairman and Committee should perform the following duties to the best of their abilities and within the capability limits of the lodge resources committed to the effort:

- Create an overall Lodge Filing Plan to account for and organize all lodge documentation and historical records (minutes, correspondence, documents, charters, photos, communications, etc) (See attachment 2 for an example of a Filing Plan)
- Capture and electronically file/organize lodge meeting minutes (not to interfere with Secretary's duties to create and maintain the minutes. The History Committee should focus its efforts on the previous year's minutes)
 - o Once the historical minutes have been electronically filed and organized under the Filing Plan, the History Committee should then concentrate each masonic year on electronically preserving and filing the previous year's minutes so as not to intrude on the Secretary's duties – so at the beginning of each new masonic year, the History Committee will begin electronically capturing the previous year's minutes and filing them according to the Filing Plan

- Electronically capture and file/organize images of key lodge documents (charter, UD Warrant, Certificates, Grand Lodge Awards/Certificates, Community Awards/Certificates, Past Master photos, portraits, etc.)
- Conduct and file member interviews on video, stored in accordance with the Lodge Filing Plan (History Committee should develop a standard interview script to ensure some specific information is captured for each member that is interviewed. History Committee should, at a minimum, interview any living Charter Members, and Past Masters as far back as may be available for contact)
- Compile the lodge history taking note of the format and recommendations provided by the Grand Lodge of Texas Committee on Masonic Education and Service (included at the end of this document as attachment #3)
- Publish the lodge history. The Chairman of the committee should coordinate with the Grand Lodge of Texas Library and plan on delivering a copy of the final document to them when published. He should also consider coordinating with the Texas Lodge of Research because there are certain circumstances under which the history might be presented at a Stated Meeting if it meets certain criteria. The Chairman should publish the initial publication and updates at a defined interval, possibly every 10 years, but at least every 25 years.
- Encourage and assist the brethren of the lodge to create masonic biographies or resumes, documenting their degree dates, offices and installation dates, awards, and so forth. The History Committee should develop a standard format for ease of filing and continuity
- Maintain the lodge historic files; create a duplicate of the electronic files and filing plan and store offsite. Update throughout the year with documentation of events, copies of correspondence, records, etc.



History Process: The history process is relatively simple to engage and maintain – once some specific steps have been taken! A Lodge Historian will find his duties much easier if he follows these steps, in this order, repeating every year with publishing at pre-determined intervals:

1. **Gather** your data and materials
2. **Organize** the data and material; create your Filing Plan
3. Create your electronic **archive**; save your data and materials to electronic files
4. **Maintain** throughout the year as events occur, documents are created or received, etc.
5. **Publish** your lodge history; an initial, and then update it at a defined interval

I have attempted to provide you a suggested charter and charge for a Lodge History Committee and History Program. This paper describes who might run it, what their duties might be, and some descriptions and examples of how they might build and maintain it. All of this comes back to the single idea of why a lodge would or should dedicate resources to an organized history program.

Every regular lodge that comprises the worldwide masonic mosaic represents a unique piece of the puzzle, with its own character, its own attributes, and its own contributions to freemasonry writ large. What a shame it is for the fraternity that throughout history, lodges have come to life, lived, and demised leaving only their charter, some minutes, a few letters, and maybe some annual reports behind. In most cases of known or suspected operative lodges dating back as far as the 13th and 14th centuries, they left even less.

Technology today provides the means for each lodge to document their own piece of the masonic mosaic. Masons of the future will, one day, research masonic events, personalities, and the lives of our many lodges; we owe it to our brethren today to represent them accurately to the future and document their places in masonic history. I hope this paper assists you in your effort.

Bro. William Boyd, Past Master
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San Antonio, Texas

With personal gratitude and fraternal appreciation for their input, suggestions, encouragement and support to:

Bro. Larry Fitzpatrick, Chairman, Grand Lodge Committee on Masonic Education and Service

Bro. Joe Sims, Chairman, Grand Lodge Bylaws Committee

Bro. Richard Schlaudroff, Master of Ceremonies, Texas Lodge of Research

Bro. Chris Williams, Grand Lodge Committee on Masonic Education and Service

Bro. Jim Wheeler, PM, Sugar Land Lodge #1141

Bro. Ken K. White, PM, Valley-Hi Lodge #1407

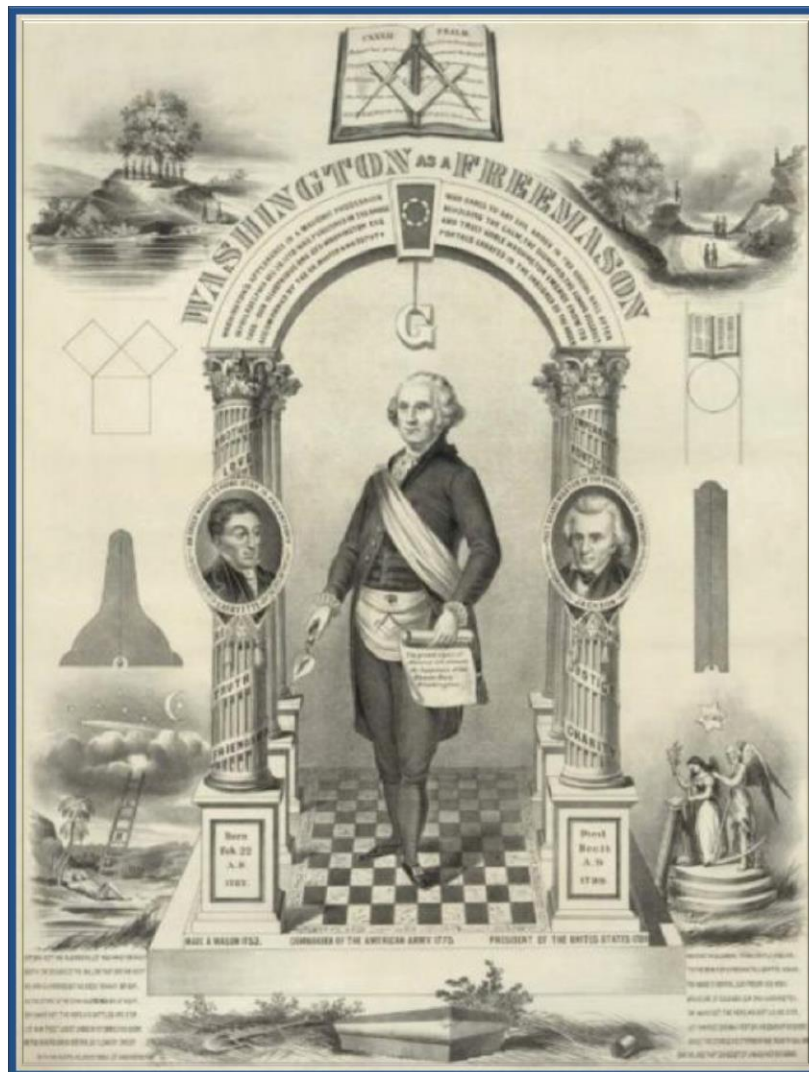
ATTACHMENT 1

Duties Listed

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ATTACHMENT 2

A Sample Lodge Filing Plan

A Lodge Filing Plan is a way to organize, file, and locate a lodge's records and historical documents. It can be very simple, or very detailed depending on the needs and age of a particular lodge. A relatively young lodge may only need a simple plan while an old lodge may require much more detail in how and where they store their materials. The following sample is a shell for a generic, simple filing plan.

Most lodges will have combinations of hard copy documents and electronic files that need to be accounted for in their Filing Plan, so the plan will need to be constructed in such a way as to account for where all types of historical records, files, and articles are located. I recommend a separate, external hard drive or external solid state drive that the Lodge Historian can dedicate solely to the lodge historical records. A two or three terabyte external drive can be purchased for about \$80.00 – I strongly suggest the lodge purchase two.

Once you have your history storage drive, or are ready to start on a lodge computer, set up your initial file structure according to folders. You might start with these folders (notice I precede the folder name with a numeric index so they will file in order of importance or need – the numbers I use are ideas or suggestions):

01 Lodge Minutes

02 Official Records

03 Lodge Correspondence

04 Grand Lodge Correspondence

05 Installations

06 Service Awards

07 Golden Trowel Awards

08 Lodge Recognition

09 Images, Videos, Interviews

10 Community Events, Awards, Recognition

Now that you have folders on the top level for filing according to major categories of information, you will need to sub-divide those with sub folders. So your plan may look like this (remember, each sub-category represents another folder):

01 Lodge Minutes

- 2019
- 2018
- Etc....

02 Official Records

- Annual Returns
- Audits
- Requests for Dispensation
- Committee Reports

03 Lodge Correspondence

- Formal to Grand Lodge (with replies)
- Formal to other lodges
- Formal to membership/members
- Incoming from lodge members

04 Grand Lodge Correspondence

- Grand Lodge Dispensation Disposition (Approve/Disapprove)
- DDGM Correspondence
- Cornerstone Planning
- Instructor/Instruction Certificates (copies)

05 Installations

- 2019
- 2018
- etc

06 Service Awards

- 25 Year Awards
- 40 Year Awards
- 50 Year Awards
- 60 Year Awards

07 Golden Trowel Awards

- 2019 (you might include the name of the recipient as part of the folder name)
- 2018 Bro. Doe
- 2017 Bro. Smith

08 Lodge Recognition

- Mason of the Year
- Outstanding Instructor Award

09 Images, Videos, Interviews

- Images of Events
- Videos of Events
- Video Interviews

10 Community Events, Awards, Recognition

- Scholarships
- Community Builder Awards
- First Responder Awards

You will find it easy to create the folders and sub-folders if you develop the plan and naming/numbering scheme on paper first. Then when you have your plan as you like it, type it up into a word document, and file it as an individual document that is filed outside the folders if you are using a dedicated drive with no other purpose, or in a folder appropriately named "00_History_File_Plan" for quick retrieval if the Lodge History shares a common lodge drive.

The folders and sub-folders above are just a sample or suggestion for a start-up Filing Plan. Within each of the sub-folders, you will need to sub-divide each into further break down according to year, or some other category. The last remaining item to consider is your file naming protocol.

You will also want to account for hard copy documents (charters, warrants, or other items you cannot reduce to an electronic copy/file). I suggest you use the actual electronic Filing Plan to document the location and important information you wish to highlight or, place a folder on your drive for each of those items and create a word document for them that describes where they are and important relevant information.

The first option might look like this:

02 Official Records

- Annual Returns
- Audits
- Requests for Dispensation
- Committee Reports
- Charter (Located on the wall, behind the Secretary's Station)

It is important how you name your files within each of the folders you have created. I recommend the first field of the file name be a date in this sequence: YYYYMMDD – so if you file minutes from a Stated Meeting on July 1, 2019, the first field of the file name would be: 20190701 – this first field, formatted this way, will automatically date-order your files.

The next field of your title should be descriptive, such as “minutes”, “installation” or, “GoldenTrowel” for a few examples. So now you have two fields of your title that would look like this:

20190701_Minutes

The third field can further refine the event if you like so it may appear as:

20190701_Minutes_StatedMeeting

You can have as many fields as you like in your title, but after a certain number of fields, the title can become difficult to work with. However many fields you need for your file library, I recommend the last field be the event date in clear language:

20190701_Minutes_StatedMeeting_July-2019

OR: 20190701_Minutes_StatedMeeting_01July2019

Whereas the first date field is formatted to index and order your file among other files, the clear language date at the end provides a convenient visual cue for someone browsing files.

EXCEPTION: Recommended format for titles for Video History interviews:

Interview_Smith_Harvey_01_1July20190

In the case of interviews for the Lodge Video History, the date the interview was conducted is not the significant detail – it's the fact it is an interview and then the name of the interviewee. Having “Interview” as the first field will group all the interviews together automatically, and the file will be ordered according to the last name of the brother.

ATTACHMENT 3

Submission of a Lodge History

(Provided by Bro. Larry Fitzpatrick, PM, Chairman, Committee on Masonic Education and Service)

What Advice Would You Give A Brother Who Intends Writing A History Of His Lodge?

First and foremost, history should be interesting reading. A Masonic Lodge's history should *never* be the mere transcription of minutes; it should be vibrant and living, as were the people who made it. John E. Kelly's history of Blue Bonnet Lodge, *Behold How Good*, and Frank S. Tamsett's of Kelly Lodge, *The Good Tree*, are excellent examples. Remember the 5 W's: who, what, when, where, and why. WHO organized the Lodge; were charter members; the balls of fire who kept things going through lean times and good; the outstanding members; became G. L. Officers; held local, state or national office? WHAT was the reason the Lodge was organized; had it done to be outstanding; is it doing today? WHEN were the Dispensation and Charter granted; did it get its current permanent home; was it honored by G. L.; did it hold unusually important meetings? WHERE was it organized, its first permanent home and homes throughout the years? Use photographs. WHY was its name chosen; were the stated communications dates selected; does it do some things different from other lodges?

Masonry in Alabama, a Sesquicentennial History, 1821-1971, by Joseph Abram Jackson, pages 207-14, will be exceptionally helpful.

The basic outline for writing a history of your own Lodge includes:

Organization

Charter Members

Dispensation and Charter

Location

Finances

Important Occasions

Outstanding Members

Accomplishments

Contemporary History

Keep Current

H. C. Arbuckle, III Corpus Christi, TX.